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L4: Entry 5 of 5

File: USPT

Aug 22, 2000

US-PAT-NO: 6108639

DOCUMENT-IDENTIFIER: US 6108639 A

TITLE: Conditional purchase offer (CPO) management system for collectibles

DATE-ISSUED: August 22, 2000

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Walker; Jay S.	Ridgefield	CT		
Van Luchene; Andrew S.	Norwalk	CT		

ASSIGNEE-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY	TYPE CODE
priceline.com Incorporated	Stamford	CT			02

APPL-NO: 08/ 964967 [\[PALM\]](#)

DATE FILED: November 5, 1997

PARENT-CASE:

CROSS-REFERENCE TO RELATED APPLICATIONS This application is a continuation-in-part of U.S. patent application Ser. No. 08/889,319, filed Jul. 8, 1997, which is a continuation-in-part of U.S. patent application Ser. No. 08/707,660, filed Sep. 4, 1996, now U.S. Pat. No. 5,794,207, each incorporated by reference herein.

INT-CL: [07] [G06 F 17/60](#)

US-CL-ISSUED: 705/26; 705/27, 705/37

US-CL-CURRENT: [705/26](#); [705/27](#), [705/37](#)

FIELD-OF-SEARCH: 705/1, 705/26, 705/27, 705/35, 705/37, 705/38, 705/39, 235/375, 235/379, 235/380, 235/381, 379/90.01, 340/825.26, 340/825.27, 340/825.28, 340/825.29, 402/22, 402/24

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

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	PAT-NO	ISSUE-DATE	PATENTEE-NAME	US-CL
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<input type="checkbox"/>	4247759	January 1981	Yuris et al.	235/381

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<input type="checkbox"/>	<u>5845265</u>	December 1998	Woolston	705/37

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ART-UNIT: 271

PRIMARY-EXAMINER: Tkacs; Stephen R.

ATTY-AGENT-FIRM: Morgan & Finnegan, L.L.P. Brandt; Jeffrey L.

ABSTRACT:

A collectible conditional purchase offer (CPO) management system is disclosed for receiving and processing individual CPOs from buyers for one or more collectibles, such as coins, stamps, art prints, comic books, baseball cards, jewelry, or other used or secondary market goods. The collectible CPO management system processes each received CPO to determine whether one or more sellers are willing to accept a given collectible CPO. If a seller accepts a given CPO, and ultimately delivers goods complying with the buyer's CPO, the buyer is bound on behalf of the accepting seller, to form a legally binding contract. The CPO is guaranteed, for example, by a general-purpose account, such as a credit or debit account. Once a CPO is accepted by a seller, but before completing the transaction, the goods are preferably forwarded to a dealer/authenticator for evaluation. The dealer/authenticator preferably validates, authenticates and optionally guarantees the goods, while also serving as the distribution point for the collectibles sold by the collectible CPO management system. In order to ensure that at least one of the accepting sellers will have the collectible item in the condition specified by the buyer, a number of sellers may conditionally accept each CPO. Each of the accepting seller(s) are preferably prioritized into a hierarchy based on predetermined criteria.

30 Claims, 16 Drawing figures

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L4: Entry 5 of 5

File: USPT

Aug 22, 2000

DOCUMENT-IDENTIFIER: US 6108639 A

TITLE: Conditional purchase offer (CPO) management system for collectibles

Application Filing Date (1):19971105Brief Summary Text (5):

Many large organizations, such as corporations or government entities, utilize a buyer-driven system to purchase goods or services at the lowest possible price. Initially, the purchaser formulates a detailed written specification, typically called a "Request for Proposal" (RFP), setting forth the quantities and requirements of what the purchaser is looking to buy. Once finalized, the RFPs are distributed to a list of known potential suppliers. Potential suppliers then screen the RFPs to identify those that they might be able to fulfill, and thereafter determine whether or not to invest the necessary time and effort to submit a formal, legally binding proposal to the buyer by a deadline established in the RFP. Once submitted, the proposals are evaluated by the buyer, and the chosen supplier, corresponding to the selected proposal, is notified that it has "won" the business at the price quoted.

Brief Summary Text (6):

Large organizations can take advantage of the benefits afforded by the RFP process because their volume buying represents a worthwhile opportunity for suppliers to compete for their business. In addition, large organizations have the resources to communicate their buying needs to a sufficient number of suppliers. As a result, large organizations can often achieve substantial unit cost savings, especially on commodities or commodity services (such as office supplies, insurance or long distance telephone service) and on perishable items (such as airline tickets and hotel rooms). Individual consumers, however, cannot effectively participate in the RFP process with current systems because they generally do not have the bulk buying power and resources of large organizations.

Brief Summary Text (7):

While there have been attempts to utilize the Internet to effectuate bilateral buyer-driven transactions between individual consumers and sellers, those attempts have been largely unsuccessful. For example, buyers can post "wanted" advertising at little or no cost on "bulletin board" type Internet sites, such as United Computer Exchange and Classified 2000, or submit bids for available products in an online auction, such as Interactive Auction Online. Thus, in an online classified system, consumers can essentially post their own RFP to a large number of potential sellers. In an online auction, however, buyers are unable to post their offer to a multiple of sellers.

Brief Summary Text (8):

In practice, it is impractical for potential sellers to frequent the various "bulletin board" sites and online classified systems, or respond to the individual RFPs which typically have diverse formats, conditions, terms, and language styles. In addition, sellers are deterred from using such a process because there is (i) no

guarantee of the authenticity of the RFP, (ii) the cost of negotiating with individual consumers is often too high, and (iii) it is difficult to enforce any agreement (including payment guarantees'which may be reached between the consumer and the seller. Thus, a seller's item may be removed from the available inventory when a buyer desires to purchase the item, until the purchase price is submitted by the buyer. Since there is no guarantee that the buyer will complete the transaction, however, the purchase price may never be submitted and the seller's item will have to be resubmitted. In turn, the absence of a critical mass of sellers reduces the incentive for buyers to post their RFPs.

US Reference Patentee Name (48):
Giovannoli

US Reference Group (48):
5758328 19980500 Giovannoli 705/26

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L5: Entry 1 of 1

File: USPT

May 26, 1998

US-PAT-NO: 5758328

DOCUMENT-IDENTIFIER: US 5758328 A

TITLE: Computerized quotation system and method

DATE-ISSUED: May 26, 1998

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Giovannoli; Joseph	Saddle River	NJ	07458	

APPL-NO: 08/ 603906 [PALM]

DATE FILED: February 22, 1996

INT-CL: [06] G06 F 7/06

US-CL-ISSUED: 705/26; 705/27

US-CL-CURRENT: 705/26; 705/27

FIELD-OF-SEARCH: 395/201, 395/226, 395/227, 395/237, 705/26, 705/27

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

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ART-UNIT: 271

PRIMARY-EXAMINER: Cosimano; Edward R.

ASSISTANT-EXAMINER: Groutt; Phillip

ATTY-AGENT-FIRM: Kaplan; Jeffrey

ABSTRACT:

A computerized system for forming a computer based communications network of network members inclusive of network buyers and or network vendors for processing requests for quotation for goods and services through at least one central processing unit including operating system software for controlling the central processing unit, storage means containing the identification of network members, means for network buyers to generate request for quotation for goods and/or services, means for transmitting said request for quotation to said central processing unit, filter means for selecting appropriate network members to receive said request for quotation based on filter conditions defined by the buyer in said request for quotation and/or by the vendor and/or by the central processing unit, means for broadcasting said request for quotation to the network members selected by said filter means and means for responding to the generator of said request for quotation with either a response to said request for quotation or with a list of said selected network members. Filter conditions may define the class of vendors in terms of geographical location, quantity, language spoken, currency, special conditions of sale, and the like.

19 Claims, 9 Drawing figures

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L4: Entry 3 of 5

File: USPT

Mar 12, 2002

US-PAT-NO: 6356909

DOCUMENT-IDENTIFIER: US 6356909 B1

TITLE: Web based system for managing request for proposal and responses

DATE-ISSUED: March 12, 2002

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Spencer; Jeffrey S.	Los Angeles	CA		

ASSIGNEE-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY	TYPE	CODE
Proposal Technologies Network, Inc.	Los Angeles	CA				02

APPL-NO: 09/ 379172 [\[PALM\]](#)

DATE FILED: August 23, 1999

INT-CL: [07] [G06 F 17/30](#)

US-CL-ISSUED: 707/10; 707/100

US-CL-CURRENT: [707/10](#); [707/100](#)

FIELD-OF-SEARCH: 707/10, 707/6, 707/104, 707/100, 707/3, 707/4, 705/1, 705/26, 705/37

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

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	PAT-NO	ISSUE-DATE	PATENTEE-NAME	US-CL
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<input type="checkbox"/>	5758328	May 1998	Giovannoli	705/26
<input type="checkbox"/>	5765138	June 1998	Aycock et al.	705/7
<input type="checkbox"/>	5802493	September 1998	Sheflott et al.	705/1
<input type="checkbox"/>	5842178	November 1998	Giovannoli	705/26
<input type="checkbox"/>	5870719	February 1999	Maritzen et al.	705/26
<input type="checkbox"/>	5878423	March 1999	Anderson et al.	707/100
<input type="checkbox"/>	6014644	January 2000	Erickson	705/37

<input type="checkbox"/>	<u>6085169</u>	July 2000	Walker et al.	705/26
<input type="checkbox"/>	<u>6088700</u>	July 2000	Larsen et al.	707/10

OTHER PUBLICATIONS

International Preliminary Examination Report, Dated Jun. 13, 2001.

ART-UNIT: 2172

PRIMARY-EXAMINER: Shah; Sanjiv

ATTY-AGENT-FIRM: Christie, Parker & Hale, LLP

ABSTRACT:

An integrated web based system for generating electronic request for proposal (RFP) forms and responding to the generated RFPs over a secure communications network. Using a web site interface, the present invention enables users to request specific information for goods and services from specific vendors, automates the process of responding to the RFPs, and automates the process of reviewing, analyzing and presenting the results. Potential vendors are notified via e-mail when the RFP is completed, and have the option to respond to the RFP by using information stored in the associated online databases or by providing new information that is then stored in the online databases. The system remembers links from questions to all appropriate responses and prompts vendors to add them to their response form. Analysis on completed forms is automated and enables the users to evaluate RFPs.

27 Claims, 28 Drawing figures

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DOCUMENT-IDENTIFIER: US 6356909 B1

TITLE: Web based system for managing request for proposal and responses

Abstract Text (1):

An integrated web based system for generating electronic request for proposal (RFP) forms and responding to the generated RFPs over a secure communications network. Using a web site interface, the present invention enables users to request specific information for goods and services from specific vendors, automates the process of responding to the RFPs, and automates the process of reviewing, analyzing and presenting the results. Potential vendors are notified via e-mail when the RFP is completed, and have the option to respond to the RFP by using information stored in the associated online databases or by providing new information that is then stored in the online databases. The system remembers links from questions to all appropriate responses and prompts vendors to add them to their response form. Analysis on completed forms is automated and enables the users to evaluate RFPs.

Application Filing Date (1):

19990823

Brief Summary Text (5):

In some cases, the due diligence may be as simple as sending a letter to a vendor describing the desired good or service and asking the vendor to respond to the letter with pricing information and a capabilities description. However, a typical method for the due diligence process is creating full-blown Requests For Proposals (RFPs) or Request For Quotations (RFQs). The process is typically one of significant labor and effort, requiring substantial time and monetary investment from the purchasers, as well as, from the potential vendors. Depending on the industry, the term RFP and RFQ is often used interchangeably. The distinction is industry specific and for the purpose of this invention, RFP is used for both. Moreover, the term user, RFP creator, and purchaser are used interchangeably; and the term vendor, respondent, proposal creator, and user are used interchangeably, throughout this application.

Brief Summary Text (6):

Goods and services that are purchased through this process need to be customized to the purchaser's specifications that are described in detail in a RFP. For many specialized goods and services, there is no retail market place that defines these specialized goods and services because these goods and services are not typically available or financially accessible to the general population. The budgets that support corporate purchasing decisions tend to be very large, often times in the millions of dollars. As a result, purchasers and their counterparts want to fully disclose their requirements to the potential vendors of goods and services. Likewise, the vendors require clear and well-defined requirements from their potential purchasers because, if they promise capabilities that they cannot deliver, they run the risk of losing the current and possibly future business. The detailed RFP or RFQ clearly defines the requirements from the vendor.

Brief Summary Text (7):

The current environment for RFPs is one where a purchaser identifies a need within the organization and creates a detailed RFP to present to the potential vendors of

the desired product. The RFP is typically comprised of questions related to the potential vendor's capabilities, operations, financial history, service areas and more. The scope of the questions is not limited to these areas, however, these are typical areas of interest for purchasers of goods and services. The process of identifying, compiling and creating RFPs tends to be labor intensive. This process, which is relatively manual, requires a serious and tedious commitment to detail. RFP questions are created from a variety of sources from inside and outside of the purchaser's purchasing organization. When all questions and specifications are completed, the RFP is compiled and prepared using a word processing program.

Brief Summary Text (8):

Once the RFP is completed, the rules for responding to the RFP and the RFP itself are printed, bound and sent out to the potential vendors. This portion includes any necessary contact information or other pertinent information. Potential vendors are identified using a variety of methods. Typically, purchasers have relationships with many of the potential vendors. Additional vendors are identified by compiling contacts from industry contacts and colleagues.

Brief Summary Text (9):

Once an RFP is received by a vendor, the vendor goes through its own due diligence process. Vendors review the RFP to see whether or not the vendors are qualified and whether they want to respond. If a vendor decides to respond, the RFP is sent to its proposal unit under the direction of an account manager or some other form of management. The proposal unit reviews each of the RFP questions and finds appropriate responses in its response manual or has to research the capabilities of the company. This response is then entered into a word processor to respond to the question. Once all of the questions have been addressed, the response to the RFP is prepared and sent back to the purchaser.

Brief Summary Text (10):

The purchaser, upon receiving the completed RFP from the vendor, begins the manual process of analyzing the results of the RFP. By reviewing each response, the purchaser can establish which vendor best meets the organization's needs. This process requires that each question be reviewed manually to ensure the question has been answered completely. While the RFP responses are being manually reviewed, often, a manual scoring mechanism in a scorecard is used to track results and responses. Once all of the results have been reviewed, the scorecard typically indicates a winner. These results are ultimately used to make final purchasing decisions.

Brief Summary Text (11):

As an example, the employee benefits industry uses this process for generating RFPs and responding to RFPs. Typically, employee benefits providers are requested to provide a proposal and description of their products by consultants who deal directly with clients such as businesses that seek health coverage for their employees. The consultant generates a RFP to be mailed to several competing health insurance providers. The RFP includes a group of questions related to the providers' products, offerings, and policies. These RFPs or questionnaires generally include numerous complex questions that require different answers depending on the purchaser requirements, size, and type of business. Furthermore, RFPs need to be customized for different purchasers based on their own specific requirements and tailored to the types of vendors providing the requested goods and services. However, many of the questions in the RFPs may be common to a variety of purchasers.

Brief Summary Text (12):

Moreover, answers are usually short lived, and need to be generated by interacting with resources located at various locations within the provider's company. The time needed by the users to generate the RFP and for the vendors to respond to a given RFP in a quality manner has increased, while the deadlines established by the

purchasers have been increasingly condensed.

Brief Summary Text (13):

Some attempts have been made to computerize some aspects of the process wherein questions and corresponding answers were stored in a database that could be accessed by responding vendors to respond to a RFP. Other systems have been described that are based on a word processing system and run in a heterogeneous environment. These semi-computerized systems lack the ease of use and portability. Users would have to acquire specialized and complex software to be able to use the system. It would be advantageous therefore to have a system that automates the entire process of creating, responding to, and analyzing a RFP in a common and homogeneous environment that is accessible by selected users without having to acquire specialized and complex software.

Brief Summary Text (15):

With respect to the processes described above, there is a need for a more efficient method of managing the entire RFP process that can automate and facilitate the creation of a RFP, response to the RFP, and analysis of the RFP in a common, secure environment accessible by selected users.

Brief Summary Text (16):

These and other needs can be met by an embodiment of the present invention. One embodiment of the present invention is a method and apparatus that enables users to create a common environment for all RFP users, both creators (consultants) and respondents (vendors), to facilitate the RFP process. An Internet based computer system assembles and organizes the information into a common format in a plurality of databases accessible through a web site interface by selected users. The system makes it easier to access, interpret and analyze all the pertinent data in a localized environment using a web site interface. The method and apparatus of the present invention greatly enhance efficiency and decrease cost.

Brief Summary Text (17):

In one embodiment of the present invention, the system and method provide RFP creators with the capability to capitalize on previously developed RFP's and specific questions within each RFP using a question database and a RFP database accessible through the web site interface. This capability is further enhanced by the ability to add new and unique questions. An automated response system enables RFP respondents to capitalize on their previously created responses to the same questions when they are re-used. The automated response system uses a response database that is linked to the question database and is accessible through the web site interface. Additionally, the RFP creators are provided with a scoring and weighting program to quickly estimate the value of each response to questions included in the RFP. This analysis program is used to create preliminary scorecards and final scorecards depending on the stage of evaluation.

Brief Summary Text (18):

An automated evaluation software module evaluates the completed vendor responses once completed RFP's have been received in their final completed form. The evaluation module evaluates responses for true and false, multiple choice, and text responses. Preferably, the text responses are summarized and evaluated only once by RFP creators who manually review new text responses, as opposed to every time they re-appear in an RFP. The system of the present invention also accurately tracks and references information from previous RFP's using an RFP database accessible through the web site interface.

Brief Summary Text (19):

The system also helps users track critical proposal guidelines, instructions, contacts, results and other key information. Accessing critical information such as questions, responses, scoring and summaries of responses in databases through a common interface, such as a web site interface, furnishes the users with a secure,

easy to use, high quality, and timely process for generating, managing, and responding to RFPs.

Brief Summary Text (20):

Another embodiment of the present invention provides a method and apparatus that enables users to generate RFP forms from a variety of sources within a secure communications network such as the Internet. RFP sources include current and historical internal RFP databases, as well as questions and references from external resources. Multiple users can collaborate on a single RFP form or on a response to a RFP from within the same office or from locations around the world. Once completed and approved, the RFP form is posted to the communications network and is given a unique location on said network so that vendors may locate it. A criteria form enables the RFP creators to add response criteria and weighted values to each individual question as they create their RFPs. The criteria are only available for use by the RFP creator for the purpose of evaluation and analysis. The criteria are preferably not made available to the vendors (respondents). These response criteria are then evaluated against the response forms to create a preliminary scorecard. The RFP creators can add weights to each section and question. When the RFP response form is evaluated, a score can be automatically tallied by the system to give reviewers a preliminary list of the qualified vendors for a given project. After totaling the scores for all of the defined responses (typically yes/no or multiple choice questions), users can evaluate text responses using the scoring system. After reviewing the responses to individual text questions, a score can be given to each response and ultimately totaled for a final scorecard.

Brief Summary Text (21):

In an embodiment of the present invention, the system creates RFP response documents from historical relationships between questions, answers, and previously created RFPs in the system. Once RFP forms have been posted to the communications network, RFP respondents can review the RFP and begin to identify appropriate responses. Using an automated linking routine, respondents can utilize the previous responses to the same or similar RFP questions stored in the response database. This part of the system also allows for collaborative behavior, enabling users to share questions and responses with respondents from remote locations. Once completed, the system runs an automated routine to determine whether or not the RFP response is completed. Responding vendors post their response to the communications network and the system sends a notification of completion to the RFP creator entity via said communications network.

Brief Summary Text (22):

Another feature of the present invention facilitates the distribution of the newly created electronic RFP document. Upon completion of the RFP form, invitation notes to participate are sent automatically by the system to the specified users via a communications network. The invitation notes include, but are not limited to, vendor password, log in information, and the address of the RFP on the communications network. Other pertinent information such as due dates and any special instructions may also be included along with the invitation. Once the vendors complete the RFP response forms (proposals), the proposals are posted to the communications network for review by the RFP creators for review and analysis.

Brief Summary Text (23):

In one embodiment, the system enables users to produce results and summary materials directly from an analysis database. Moreover, users can track their progress on a multitude of projects using a project manager software tool. The RFP respondents may also be notified of their status on any given RFP. This is carried out by a progress tracker that monitors each response to make sure it is complete, a status tracking software tool which informs respondents of the status of their completed responses, and quality tracking software tool which provides feedback on reviewed RFPs once they have been scored. These software tools collectively make up

the project manager software tool.

Drawing Description Text (8):

FIG. 4 is a simplified flow diagram for creating an RFP;

Drawing Description Text (9):

FIG. 5 is a simplified flow diagram for responding to an RFP;

Drawing Description Text (10):

FIG. 6 is a simplified flow diagram for evaluating a completed response to a RFP;

Drawing Description Text (14):

FIG. 10 is a simplified flow diagram for a RFP simulator;

Drawing Description Text (16):

FIG. 12 is an example of actions (options) available to a RFP creator upon logging in to the system;

Drawing Description Text (17):

FIG. 13 is an exemplary form for creating a new RFP;

Drawing Description Text (20):

FIG. 16 is an exemplary form for selecting the RFP recipients and sending them an invitation to response;

Drawing Description Text (25):

FIG. 21A is an exemplary form for a RFP;

Detailed Description Text (2):

The present invention makes the RFP process more cohesive from start to finish. The Internet-based computer system of the present invention facilitates consistency among all users, both purchasers and vendors, by creating a common environment in a communication network to guide users on both sides of the process. Accordingly, the results are more accurate, timely, and complete. The process of the present invention includes creating a RFP, responding to the created RFP, analyzing the responses to the RFP, presenting and reporting the results, and maintaining and updating databases. Additionally, the present invention includes computer programs for searching and templates for creating new RFPs that are specific to particular industries such as the employee benefits and manufacturing industries. The present invention also provides a computer program for checking the accuracy of the information contained in the databases including a spell check program, and a program for presenting the completed analysis.

Detailed Description Text (3):

Additional presentation materials and information such as drawings, graphics, tables or other electronic documents can be attached to the created RFP forms or to the proposals.

Detailed Description Text (9):

FIG. 1 shows a block diagram of a typical Internet client/server environment used by the RFP creators and RFP respondents in one embodiment of the present invention. PCs 220a-220n used by the RFP creators and RFP respondents are connected to the Internet 221 through the communication links 233a-233n. Optionally, a local network 234 may serve as the connection between some of the PCs 220a-220n, such as the PC 220a and the Internet 221. Servers 222a-222m are also connected to the Internet 221 through respective communication links. Servers 222a-222m include information and databases accessible by PCs 220a-220n. In one embodiment of the present invention, a question database, a response database, an analysis database, a client database, a user database, and a RFP database (shown in FIG. 3) reside on at least one of the servers 222a-222m and are accessible by the RFP creators and RFP respondents using

one or more of the PCs 220a-220n.

Detailed Description Text (13):

FIG. 2 depicts a flow diagram of a computer program executed by one or more of the PCs 220a-220n for one embodiment of the present invention. The computer program generates, applies, and maintains RFPs in a web-based environment. A web site interface 1 (shown in FIG. 3) provides the user interface to a plurality of databases for the authorized users such as purchasers (RFP creators) and vendors (RFP respondents). In step 200, PC users access a web site residing on one of the servers 222a-222m to log into the system. Once a user is properly logged in and the user's password is verified, the user is provided with the web interface 1. Depending on the type of the user (i.e., a RFP creator or a RFP respondent), the user is given access to the appropriate databases residing on one or more of the servers 222a-222m. An RFP creator uses one of PCs 220a-220n to access a Question database residing on one of servers 222a-222m.

Detailed Description Text (14):

RFP questionnaires are compiled by using the Question database via the Internet 221 (in FIG. 1) where selections are made by the RFP creator to create a completed RFP as shown in step 201. To create the RFP, RFP creators may search the Question database using a database search program and select from a set of related questions from the Question database, from edited existing questions, from newly created questions, or from any combination of the three. The newly created and revised questions are then stored in the question database for future use. In the alternative, RFP creators, using one or more of PCs 220a-220n, can access a RFP database, residing in at least one of servers 222a-222m, through the web site interface 1 to search and select a previously created RFP. The selected RFP can then be modified and tailored to create a new RFP. An example of a created RFP is shown in FIG. 21A.

Detailed Description Text (15):

Once the RFP is created, it is posted in a location on the Web accessible through the web site interface 1. Posting a document in an Internet environment, stores the document in a location on the Web and makes it accessible to qualified users. Next, in step 202, the computer program helps the RFP creator to generate an electronic notification, such as an e-mail that includes an address to the location of the posted RFP on the Web (address of the server that the RFP is stored and the location of the RFP within the server) and a user password to access the posted RFP. The notification is then sent to selected respondents using the PCs 220a-220n connected to the Web through the communication links 220a-233n.

Detailed Description Text (16):

Upon receiving the notification, the selected respondents utilize the user password to access the posted RFP on the given location within the web site environment (the respective server). In step 203, the respondents utilize a response database that is linked to the question database to generate responses to the posted RFP. Each question in the question database is linked to one or more appropriate responses in the response database. Responses are identified for the RFP by reviewing these links between questions and responses. Once the computer program identifies these links, it suggests the identified responses to the respondent as potential responses. The age and appropriateness of the response is also evaluated when the system makes decisions for matching questions and responses.

Detailed Description Text (17):

The computer program ranks responses and orders them in the order of response that is most likely to satisfy the question in the RFP. The RFP respondent, using one or more of PCs 220a-220n, may select one or more responses for a given question, edit and modify the response, and use the response to compile a completed response to the entire RFP. Once the response to the posted RFP (proposal) is completed, it is posted on a location accessible through the web site interface 1 (stored in one of

servers 222a-222m). An electronic notification, such as an e-mail is then sent to the RFP creator through the Internet 221 to indicate the completion of the proposal as shown in step 204. An example of a completed response to a RFP (proposal) is shown in FIG. 21B.

Detailed Description Text (18):

Once the response to the posted RFP is received, the RFP creator reviews and analyzes the response using a computer program as depicted in step 205. The RFP creator, using one or more of PCs 220a-220n, begins an initial review of the response (proposal) by using the automated features of the present invention. The RFP creator reviews responses to the yes/no, true/false, multiple choice, and selected text questions and responses, provided the text responses have been manually reviewed in previous RFPs. The system creates an initial score based on the evaluated responses. Next, the RFP creator reviews the remaining responses and scores them accordingly. The system includes the capability of outputting the analysis data and other information to off-the-shelf software such as Microsoft Excel.TM., Microsoft Word.TM., Microsoft Access.TM. and Microsoft Powerpoint.TM., among others, for further analysis, reports generation, and presentations.

Detailed Description Text (19):

In one embodiment of the present invention, the system includes the ability to perform, from within the system, online review, analysis, scoring and presentation generated by at least one of the servers 222a-222m. In step 205, the results of each proposal analysis are presented in user-customized reports. As shown in step 208, all the databases residing in one or more of the servers 222a-222m are maintained up-to-date to make available to the users all the information gathered and stored within the system, where appropriate. This allows the users to use the updated databases to prepare and respond to future RFPs. Additionally, the system has the ability to maintain contacts, RFP status, results of RFPs, and other information about RFPs and clients. At any step in the process, a RFP creator or a respondent may check the status of the RFP or the response respectively, as illustrated by step 207.

Detailed Description Text (20):

FIG. 3 shows a web site interface 1 and the associated databases residing on one or more of servers 222a-222m. Web site interface 1 residing on one of servers 222a-222m is the user interface for the system and is also used for navigating through the databases. Each PC 220a-220n used by a RFP creator or a RFP respondent, accesses any of the servers 222a-222m through the web site interface. Depending on the user type (RFP creator or respondent), the web site interface is customized for questions and/or responses. Additionally, the web site interface 1 includes user specific customizations so that each user can efficiently use the system in a simple manner. Also, the system can be customized to match the look and feel of a user's existing Internet/Intranet.

Detailed Description Text (21):

Question database 2 stored on at least one of the servers 222a-222m is a database for current and historical questions accessed through the web site interface for developing questionnaires, linking to responses, and linking to historical response analysis. As questions Q1-Qj are created in the user environment, they are assigned unique system identifiers. These identifiers include question ID code, user ID code, RFP ID code and client ID code. This string of codes links the question to an appropriate response once a response has been produced. When a response to a question (identified via a concatenated code) is produced, the system records the question identification codes and stores them in the response database 4 along with the response and the response ID.

Detailed Description Text (23):

Analysis database 3 stored on at least one of the servers 222a-222m is a historical database, accessed through the web site interface 1, that contains the historical

analysis and results of all previous RFP's. Any results and findings Al-Ak are captured and stored here. These analysis are made available to qualified users within the network. Analysis can be used to reflect comments on a particular question, response, user, vendor or client. Additionally, the analysis results can be re-used if the user chooses to do so. For example, the analysis would be re-used for the RFP simulator discussed below.

Detailed Description Text (24):

Response database 4 stored on at least one of the servers 222a-222m is a current and historical database, accessed through the website interface 1, for responding to RFP's through active links to questions asked in the posted proposal. Response database 4 includes responses R1-Rl that are linked to some of Q1-Qj in the Question database 2. When a historical response that matches an established criteria is identified by the computer program as being a match to a question in the posted RFP, that response is identified as a potential match and is presented to the RFP respondent as such. An exemplary screen for the presentation of the matched question(s) to the RFP respondent is shown in FIG. 24. There may be more than one response matching a given question. In such cases, the system provides the RFP respondent with a list of matched responses. The respondent can then select the most appropriate response from the list and add the selected response to the proposal. Preferably the list is ordered based on the degree of appropriateness of a response. For example, a response that has the most matched criteria is listed on top.

Detailed Description Text (26):

RFP database 7, stored on at least one of the servers 222a-222m and accessed through the website interface 1, is a current and historical account of all RFP data RF1-RFs, including type of RFP, creator of RFP, client of RFP, analysis results of RFP, and other pertinent RFP information. This database is accessed by the RFP creator to help the creator generate the RFP. An existing RFP may be selected from this database and if needed, can be edited to create a new RFP.

Detailed Description Text (28):

FIG. 4 is a flow chart of a RFP creation process that is comprised of three major processes including creating the RFP from a template, creating RFP evaluation criteria, and posting the RFP to a unique web address. Log in step 10 identifies the user to the system. The system automatically directs users to their customized web site interface based upon the log in ID. RFP creators are directed to the creator and analysis section while respondents are directed to the response section. In an exemplary embodiment, the log in form uses cookies to remember a user ID and password. The cookies expire when users exit their web browsers. In step 11a, the RFP creator selects the desired action. Examples given are, the process of creating a new RFP, reviewing an RFP response, or maintaining the database. If create RFP is selected, in step 11b, the RFP creator decides whether to use an archives RFP or create a new RFP. FIG. 12 is an example of actions (options) available to a RFP creator upon logging in to the system.

Detailed Description Text (30):

Referring back to FIG. 4, to create a RFP, the RFP creator may use an existing RFP stored in the RFP database 7 or create a new RFP as depicted in step 12. The RFP creator can also choose to review archived RFPs as shown by the "archived" path of step 12. As a result of this decision, the creator can select a saved RFP from the RFP database 7 (step 25). In step 21, the user may decide to create a new RFP by using client specific questions and by adding the client contact information including the type of RFP.

Detailed Description Text (31):

FIG. 3B schematically depicts the linkage between the databases. When an RFP is created in step 201, it is assigned a code 201c that identifies it to the system in the RFP database 7. As questions are created in step 201b, they are assigned a

unique question code 201e and stored in the Question database 2. The question code 201e is then linked to the RFP database 7 to identify it as a part of the RFP. User information about who created the question and who used the question in subsequent RFPs is stored in the User database 6. When a response is provided to the given question in step 203, it is entered into the Response database 4. The Response database 4 also records the question ID 201e so that if the question ID re-appears in future RFPs its response is linked to the question and is made available for reuse. The same linking process holds true for multiple responses to the same question.

Detailed Description Text (32):

When analysis is done on the responses in step 205, the same process holds true. Responses are received and analyzed on the established scoring criteria for yes/no multiple choice defined answers. Preferable, the text responses are manually reviewed. Once the text response is reviewed, it is stored in the analysis database 3 with an analysis ID code 205c along with the response ID code 203c. When the response is reused, the response code 203c triggers a match in the analysis database 3 resulting in a matched analysis ID. The analysis stored in the Analysis database 3 corresponding to this analysis ID is then offered to the user as possible analysis for the RFP.

Detailed Description Text (36):

Referring back to FIG. 4, RFP questions can be organized into different sections. For example, questions can be organized under "qualifying questions," "administration," and/or "finance" sections. As shown in step 22, using the question database 2, the user can add previously created sections and questions. Also, the user can add new questions or sections. Using templates for predetermined RFP types (step 23), RFP creators can quickly choose a template that enables them to begin creating a client specific RFP. After the template or an existing RFP is selected, the user may review the RFP to add or delete appropriate sections or questions, as shown in step 24.

Detailed Description Text (37):

FIG. 13 shows an exemplary form for creating a new RFP. In this exemplary form, a "New RFP Type" is selected for the "RFP Type" box. Relevant information about the new RFP, such as the name of the company, any special instructions and disclosures are entered, and the "Create New RFP" box is selected. Selecting the "Create" button in FIG. 13 brings up an interim administration form that allows a user to take the first steps of adding questions as shown in the exemplary form of FIG. 19.

Detailed Description Text (40):

Additionally, each question/section is given a weight that is used to develop a scorecard. The scorecard enables the RFP creator to review and value individual question responses. The scorecard is a user defined form designed to aid in the identification of qualified vendors. The points for the weighted questions and sections are summed to produce the scorecard document that identifies the most qualified vendors.

Detailed Description Text (41):

Referring back to FIG. 4, in steps 26 and 27, the question criterion and the question weight are added or edited. RFP creators may organize questions and sections within the RFP, for example, using navigation bars to re-order questions and sections, as depicted in step 28. Also, simple or complex instructions and attachments can be added to a created RFP as shown in step 29. This includes attached files in various formats including word processing and spreadsheet formats. If the RFP is ready, the completed and formatted RFP including related criteria is stored in the RFP database 7 for future reference as shown in step 31. If the RFP does not meet the client specific requirements, it goes back to the update RFP process in step 26. The system, in step 32, posts the RFP to a web site

location accessible by selected users. In one embodiment, the created RFP is stored in a location on the host server.

Detailed Description Text (42):

One or more secure servers, requiring password, with data encryption capabilities to protect the confidentiality of the data is used to store all the data. In step 33, a list of recipients for the created RFP is compiled. E-mail, phone number, address and other pertinent information are entered in this step. An existing list stored in an address book may also be utilized to select the RFP recipients, as shown in FIG. 16. In step 34, the RFP recipients are selected preferably in the same screen.

Detailed Description Text (43):

FIG. 16 depicts an exemplary screen for selecting the RFP recipients and sending them an invitation to response to the posted RFP. A list of potential RFP recipients is displayed on this screen. Each name may be individually selected (or de-selected) by placing a check next to the name to be selected. This list may be ordered and displayed accordingly based on the type of the posted RFP, the RFP creator or the company that is seeking to purchase the goods and services from the RFP respondents through the RFP creator. A message with instructions is entered in the message box. The instruction include the address of the posted RFP within the web site environment, and a password for the respondents to be able to access the posted RFP.

Detailed Description Text (44):

Preferably, the web site location and the password are automatically entered by the system. In one embodiment, the password is specific to each RFP recipient. In another embodiment, the password is specific to the RFP creator and is the same for all the RFP recipients for a given RFP. New contacts can be added by selecting "address book," underlined in the exemplary screen of FIG. 16.

Detailed Description Text (45):

In an exemplary embodiment, if the user (RFP creator) selects the "address book," the screen of FIG. 17 appears that is used to add, edit, or delete contacts. A list of existing contacts is displayed within the screen of FIG. 17. Each contact name can be selected for editing or deleting the selected name. The order of the list may be customized by the user. If a contact name is selected, the screen of FIG. 18 is shown that is used to edit or delete the selected contact name. A new contact may be added by selecting "To add a contact go here" area of the screen shown in FIG. 17. If this feature is selected, the screen of FIG. 18 is provided to the user for adding new contacts.

Detailed Description Text (47):

Referring back to FIG. 4, once the RFP is ready and the appropriate RFP recipients are selected, invitations are e-mailed to the selected recipients. FIG. 16 shows an exemplary screen for sending RFP invitations via e-mail. This e-mail includes the RFP web site location, for example the Uniform Resource Locator (URL) address for the computer that hosts the web site. The e-mail also includes a password to access the site upon logging in, and any instruction or additional contact information as part of the message body or as part of a file attachment.

Detailed Description Text (48):

When the RFP is posted and the selected recipients are notified, RFP recipients access the posted RFP using the address and the password(s) included with the notification messages. The RFP recipients (potential respondents) are then able to go to their personalized proposal administration page (shown in FIG. 20) to view all proposals to which they have received invitations. This proposal administration area further enables respondents to examine the RFP and if they decide to respond, they initiate the response process, as shown in FIG. 21B. RFP respondents/vendors can utilize the previous responses to the same or similar RFP questions stored in

the response database. As shown in FIG. 21A, RFP is organized by different sections. The status of the RFP is noted at the top of the form.

Detailed Description Text (49):

FIG. 5 shows a flow diagram for responding to a posted RFP (shown by step 203 of FIG. 2). Once selected respondents have received the e-mail invitation via the Internet 221 and logged into the system using one or more of PCs 220a-220n, they may link directly to and review the posted RFP as indicated in step 40. In step 41, based upon previous responses to the same or similar questions stored in the response database 7, respondents can use an Auto-fill feature to respond to questions. Upon selecting this feature, the system searches the response database 4 to match the questions within the posted RFP to one or more responses stored in the response database 4. As indicated above, the responses are linked to questions using unique codes included with questions in the RFP as shown in FIG. 24.

Detailed Description Text (52):

When there is no matched response, or when existing responses are not adequate, respondents are provided the capability to create new responses, as shown in step 46, and store them in the response database 4. In step 47, "Assign/Email Question to Team Member" feature allows a RFP respondent to send question to other team members or other experts to answer any given question. This provides an integrated and shared environment for different users (members of a team) to work on the same proposal. The responses from other team members are received and placed directly into the RFP in step 48. If there are matched responses in step 41, but they do not meet all the question specifications, the responses are updated to meet the criteria in step 49. In the alternative, existing responses can be edited to answer the question.

Detailed Description Text (54):

If the proposal document has been through all of the response steps and it meets the requirements specified by the RFP, it is forwarded for posting on a location on the web in step 54. If the RFP is not ready it cycles back through the preparation process until it is completed as shown by the "No" path from step 54 to step 40. The system then, in step 55, automatically sends an e-mail to the RFP creator indicating that the response to the RFP is completed and has been posted to a web site. In step 56, the completed response is posted to an appropriate web location simultaneously with the e-mail notice of completion. The system notifies the RFP respondent that the proposal has been posted as shown in FIG. 22. In step 57, the completed response is automatically stored in response database 4.

Detailed Description Text (55):

When the e-mail notice of completion is received by the RFP creator, the RFP creator or the creator's delegates may review the proposal using the automated features of the system that utilizes the criterion and weight associated with each response within the proposal. The analysis may begin once a response deadline has passed or when all of the completion e-mails have been received. In step 60, the system checks all RFPs to verify that all completed responses have been submitted. A response wizard validates all question responses and compares them to an established scoring criteria. The response wizard, based on the weights of the questions and weights of the RFP sections, creates a report in step 69 giving preliminary results for all questions that can be evaluated by the system. This report details the initial findings based upon the established criteria which can be evaluate by the system. The report includes yes/no questions, multiple choice and text questions that can be evaluated by the system without manual intervention.

Detailed Description Text (56):

Based upon the results of the report, the RFP creator can determine which vendors meet the basic criteria to continue with the evaluation process. If a vendor meets the minimum criteria set by the user, they are considered a finalist as shown in

step 62. If a vendor does not meet the criteria, the rest of the analysis is terminated and the vendor is no longer considered for the proposal (step 63). In step 70, the rejected vendors are issued a notice, preferably, by e-mail that they are no longer in contention for the work. This notice is also posted to a status report page.

Detailed Description Text (57):

The remaining subjective responses are reviewed in step 64. These subjective responses can be truncated for reporting and analysis purposes. The original response remains intact in the response database. There is a link between the text responses and analysis of those responses that are stored in the analysis database. The truncated response can be used for future analysis and RFPs. For example, when the same text response to a question is received by the RFP creator, the received response can be checked against its previous analysis. The same scoring criteria as the previous criteria for the previous response may be used by the RFP creator for the received response. Because questions may be used over and over, these responses or summaries of the responses can be re-used. In step 71, using question and response links (unique codes to identify relationships from responses to summary of responses), the summarized responses are automatically shown in the scoring system. Any responses not covered by the response wizard are evaluated manually and summarized. Once summarized, the summaries will be available for future analyses.

Detailed Description Text (58):

In step 65, a scoring process is performed for RFP creators for storing, updating and maintaining results from step 64. Responses are compared to the existing criteria for each question. Scorecard results are created in step 66 for the remaining responses. The scorecards summarize all of the findings from the response wizard in step 61 and step 65. The scorecards are used to identify the vendors which best meet the users' needs. This information is then stored in the analysis database 3. The final summary reports/scorecards are generated in steps 67 and 68. This allows users to prepare reports at any time during the process. Any additional information that may be needed is generated. This allows users to output all of the data into the format of their choice or use the internal system tools to generate reports/results. Based upon all findings, a winner is chosen in step 73 and the results are stored in the analysis database 3, in step 74.

Detailed Description Text (61):

Data related to each client is stored in the client database 5. This data may be used to facilitate the creation of an RFP for the same or a different client. FIG. 9 shows a flow diagram for archiving and using client data. A search for client or RFP type is performed by the user in step 120. The user may search for client specific work, RFP type, or any other searchable parameter related to the client work. In step 121, a decision is made as to how the results will be used. Results can be either reviewed online, extracted for external analysis or used in a RFP simulator described below. The results are reviewed in step 122 and outputted in step 123.

Detailed Description Text (62):

A proposal simulator allows the users to evaluate historical responses to a RFP. The proposal simulator is useful for developing new "mock" RFPs and "mock" proposals by the RFP creator based on the existing information that the RFP creator has access to. The simulator produces a quick review of selected vendors and selected questions. For the simulator to be functional, the selected questions must contain responses that had been collected and evaluated in previous proposals. FIG. 10 illustrates a flow diagram for a RFP simulator. In step 140, previous RFP participants are selected from the RFP database 7. The type of RFP to model (for example, medical, dental, etc.) is selected in step 141. Next, questions from the database that each vendor has in common are selected in step 142 in order to create the model RFP. Then, criteria and scoring for the model RFP are entered in step 143 and the results are evaluated in step 144. The results are then summarized in a

scorecard for presentation or analysis as shown in step 145. In step 146, the results are stored for future use and reference.

Detailed Description Text (63):

At any time during the process, a status report may be generated based on a user request. The purpose is for any user to check the status of any related RFP. FIG. 11 shows a flow diagram for generating status reports. In step 160, the desired process is chosen by the user. The status of existing and historical RFPs may be checked in step 161 and notices from respondents may be reviewed in step 162. Contact information is maintained in step 163. This includes granting access to team members or updating contacts information. Participants in the RFP may be added in step 164, or deleted as shown in step 165. In step 166, vendors may ask questions of the RFP creators, for example, using a bulletin board accessible on the web. The bulletin board set up allows vendors to ask question and receive responses from the RFP creators. This bulletin board set up also allows vendors to find questions and answers asked by them and other RFP participants. An interactive online help is also provided by the system, as indicated by step 167, to help the users effectively use the system.

US Reference Patentee Name (2):

Giovannoli

US Reference Patentee Name (5):

Giovannoli

US Reference Group (2):

5758328 19980500 Giovannoli 705/26

US Reference Group (5):

5842178 19981100 Giovannoli 705/26

CLAIMS:

1. A web based computer system for managing creation of a request for proposal (RFP) and responding to the RFP comprising:

a web site accessible by qualified users;

a question database accessible through the web site for storing a plurality of RFP questions;

a first computer linked to the web and used by an RFP creator to create the RFP;

means for selecting questions from the question database for use in the RFP;

means for creating the RFP from the selected questions from the question database;

means for storing the created RFP in a first location on the web site accessible by a selected RFP respondent;

means for electronically notifying the selected RFP respondent;

a response database linked to the question database and accessible through the web site for storing a plurality of responses;

means for searching the response database for matching and selecting responses to the questions in the created RFP to generate a proposal in response to the RFP;

a second computer linked to the web and used by the selected RFP respondent to create the proposal including selected responses from the response database;

means for storing the generated proposal in a second location on the web site accessible by the RFP creator;

means for electronically notifying the RFP creator; and

means for storing the created RFP in a RFP database.

5. The computer system of claim 1 further comprising a client database storing information including client contact and RFP information.

7. The computer system of claim 1 wherein means for electronically notifying the selected RFP respondents comprises means for identifying the selected respondents from a respondent list including names and e-mail addresses; and means for sending a message to the identified respondents, the message including a location for the stored RFP and a password for accessing the stored RFP.

10. A method for generating a request for proposal (RFP) and responding to the RFP through a web site interface accessible by qualified users, the method comprising:

accessing a question database through the web site for creating the RFP by a RFP creator;

selecting questions from the question database;

creating the RFP responsive to the selected questions from the question database;

selecting one or more qualified RFP respondents from a list of RFP respondents;

storing the created RFP in a first location on the web site accessible by the selected RFP respondents;

electronically notifying the selected RFP respondents;

searching a response database linked to the question database for matching and selecting responses to the questions in the created RFP to generate a proposal in response to the RFP;

generating the proposal including selected responses from the response database;

storing the generated proposal in a second location on the web site accessible by the RFP creator;

electronically notifying the RFP creator; and

storing the created RFP in a RFP database for future use.

14. The method of claim 10 wherein the step of electronically notifying the selected RFP respondents comprises identifying the selected respondents from a respondent list including names and e-mail addresses; and sending a message to the identified respondents, the message including a location for the stored RFP and a password for accessing the stored RFP.

16. The method of claim 10 further comprising generating a status report for the RFP and the proposal.

17. The method of claim 10 further comprising searching the RFP database, selecting a RFP, and including the selected RFP in the proposal.

18. The method of claim 17 further comprising editing the appropriate RFP.

19. The method of claim 10 further comprising maintaining the question database, the response database, and the RFP database.

22. The method of claim 10 further comprising generating a mock RFP and generating a mock proposal by the RFP creator based on existing questions and responses.

26. A programming system for operation of a computer system, the computer system having, connected together for access over the web, a plurality of computers for creators of requests for proposals (RFPs), a plurality of computers for respondents of RFPs and a plurality of servers for storing information, the programming system being arranged for creation of a RFP and responding to the RFP comprising:

a question database stored in at least one of said plurality of servers for storing a plurality of RFP questions accessible over the web;

a first searching program for enabling the computer system to search said question database;

a selecting program for enabling the computer system to select one or more questions from said plurality of RFP questions to create the RFP accessible over the web;

a document creation program for enabling the computer system to create the RFP responsive to the selected one or more questions;

a first web posting program for enabling the computer system to store, for access over the web, created RFPs created by said computers for RFP creators;

a first notification program for enabling the computer system to notify selected said computers for respondents of said created RFPs;

a response database linked to said question database and stored in at least one of said plurality of servers, including a plurality of possible responses to the RFP questions;

a second searching and matching program enabling the computer system to search said response database and selectively match up selected ones of said plurality of possible responses to said created RFPs that have been stored to thereby create proposals accessible over the web;

a second web posting program for enabling the computer system to store, for access over the web, created proposals created by said computers for RFP respondents; and

a second notification program for enabling the computer system to notify selected said computers for creators of said created RFPs.

27. A computer readable medium having stored thereon a set of instructions including instruction for generating a request for proposal (RFP) and responding to the RFP through a web site interface the instructions, when executed by a plurality of computers connected to the Internet, cause the computers to perform the steps of:

accessing a question database through the web site for creating the RFP by a RFP creator;

selecting questions from the question database;

creating the RFP responsive to the selected questions from the question database;

selecting one or more qualified RFP respondents from a list of RFP respondents;
storing the created RFP in a first location on the web site accessible by the selected RFP respondents;
electronically notifying the selected RFP respondents;
searching a response database linked to the question database for matching and selecting responses to the questions in the created RFP to generate a proposal in response to the RFP;
generating the proposal including selected responses from the response database;
storing the generated proposal in a second location on the web site accessible by the RFP creator;
electronically notifying the RFP creator; and
storing the created RFP in a RFP database for future use.

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L4: Entry 1 of 5

File: USPT

Aug 12, 2003

US-PAT-NO: 6606603

DOCUMENT-IDENTIFIER: US 6606603 B1

TITLE: Method and apparatus for ordering items using electronic catalogs

DATE-ISSUED: August 12, 2003

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Joseph; Joshy	San Francisco	CA		
Putanec; Boris	Menlo Park	CA		

ASSIGNEE-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY	TYPE CODE
Ariba, Inc.	Sunnyvale	CA			02

APPL-NO: 09/ 276921 [\[PALM\]](#)

DATE FILED: March 26, 1999

PARENT-CASE:

RELATED APPLICATIONS This application is a continuation-in-part of International Application No.: PCT/US98/08407 filed Apr. 27, 1998 published as International Publication Number WO 98/49644 on Nov. 5, 1998 which claims priority from U.S. application Ser. No. 60/044,372 filed Apr. 28, 1997.

INT-CL: [07] [G06 F 17/60](#)

US-CL-ISSUED: 705/26; 705/1, 705/27

US-CL-CURRENT: [705/26](#); [705/1](#), [705/27](#)

FIELD-OF-SEARCH: 705/26-27, 705/37, 705/1, 705/30, 235/385

PRIOR-ART-DISCLOSED:

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<input type="checkbox"/> 4774663	September 1988	Musmanno et al.	364/408
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L4: Entry 1 of 5

File: USPT

Aug 12, 2003

DOCUMENT-IDENTIFIER: US 6606603 B1

TITLE: Method and apparatus for ordering items using electronic catalogs

Application Filing Date (1):

19990326

Detailed Description Text (27):

In other embodiments, several additional services for buyers and suppliers using the system 150 may be provided, including: Auctions for surplus materials; Pre-negotiated supplier contracts; Vertical industry buying consortiums; Government contracts center; RFP/RFI listing services; Ad-hoc purchasing services; Strategic sourcing.

US Reference Patentee Name (40):

Giovannoli

US Reference Group (40):

5758328 19980500 Giovannoli 705/26

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ART-UNIT: 3625

PRIMARY-EXAMINER: Nguyen; Cuong

ATTY-AGENT-FIRM: Blakely Sokoloff Taylor & Zafman LLP

ABSTRACT:

A system for electronically ordering items having at least one supplier computer system for storing at least one catalog containing the items offered by a supplier and a customer computer system with the improvement of a public computer system comprising an index to the items in the catalogs on the at least one supplier

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computer system, means for querying the index on the public computer system for a desired item in response to a request for the desired item from the customer computer system and means for generating a pointer for the customer computer system to catalog information about the desired item in the catalog on the at least one supplier system which has been identified by the query of the index.

3 Claims, 7 Drawing figures

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L4: Entry 2 of 5

File: USPT

Jul 9, 2002

US-PAT-NO: 6418415

DOCUMENT-IDENTIFIER: US 6418415 B1

**** See image for Certificate of Correction ****

TITLE: System and method for aggregating multiple buyers utilizing conditional purchase offers (CPOS)

DATE-ISSUED: July 9, 2002

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Walker; Jay S.	Ridgefield	CT		
Tedesco; Daniel E.	Monroe	CT		
Jorasch; James A.	Stamford	CT		

ASSIGNEE-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY	TYPE CODE
priceline.com Incorporated	Stamford	CT			02

APPL-NO: 08/ 943266 [PALM]

DATE FILED: October 3, 1997

PARENT-CASE:

CROSS REFERENCE TO RELATED APPLICATIONS This application is a continuation-in-part of U.S. patent application Ser. No. 08/889,319, filed Jul. 8, 1997, which is a continuation-in-part of U.S. patent application Ser. No. 08/707,660, filed Sep. 4, 1996, now U.S. Pat. No. 5,794,207, each incorporated by reference herein.

INT-CL: [07] G06 F 17/00

US-CL-ISSUED: 705/26; 705/27

US-CL-CURRENT: 705/26; 705/27

FIELD-OF-SEARCH: 705/80, 705/26, 705/27, 705/30, 705/37

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

☐ Search Selected☐ Search ALL☐ Clear

PAT-NO

ISSUE-DATE

PATENTEE-NAME

US-CL

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ABSTRACT:

An aggregate conditional purchase offer (CPO) management system for receiving and processing CPOs from buyers for one or more goods or services is disclosed. Received CPOs are processed to determine whether the CPO should be provided to sellers individually and/or collectively as part of an aggregate CPO. If a CPO is accepted individually, or collectively as part of an aggregate CPO, the buyer is bound on behalf of the accepting seller. CPOs are administered on behalf of groups of buyers to form aggregate CPOs which are offered to sellers. Groups are preferably formed dynamically in accordance with predefined aggregation rules. The unit price associated with an aggregate CPO may be an average of the individual CPO prices for each CPO included in the aggregate CPO. Alternatively, the aggregate CPO price may be the total of the individual CPO prices for each CPO included in the aggregate CPO. The aggregation rules can optionally require that the terms of an individual CPO, including price, be within predefined tolerances of the terms of an aggregate CPO or one or more pending individual CPOs, in order for the individual CPO to be included in the aggregate CPO. Buyers may optionally review pending aggregate CPOs, prior to submitting a new CPO, so that the buyer can request to include the new CPO in one or more existing aggregate CPOs. Buyers may be requested to modify the original terms of a CPO to conform the terms to an existing aggregate CPO or one or more pending individual CPOs, so that the modified CPO can be included with the pending aggregate CPO or the pending individual CPOs to form a new aggregate CPO.

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TITLE: System and method for aggregating multiple buyers utilizing conditional purchase offers (CPOS)

Application Filing Date (1):19971003Brief Summary Text (5):

Many large organizations, such as corporations or government entities, utilize a buyer-driven system to purchase goods or services at the lowest possible price. Initially, the purchaser formulates a detailed written specification, typically called a "Request for Proposal" (RFP), setting forth the quantities and requirements of what the purchaser is looking to buy. Once finalized, the RFPs are distributed to a list of known potential suppliers. Potential suppliers then screen the RFPs to identify those that they might be able to fulfill, and thereafter determine whether or not to invest the necessary time and effort to submit a formal, legally binding proposal to the buyer by a deadline established in the RFP. Once submitted, the proposals are evaluated by the buyer, and the chosen supplier, corresponding to the selected proposal, is notified that it has "won" the business at the price quoted.

Brief Summary Text (6):

Large organizations can take advantage of the benefits afforded by the RFP process because their volume buying represents a worthwhile opportunity for suppliers to compete for their business. In addition, large organizations have the resources to communicate their buying needs to a sufficient number of suppliers. As a result, large organizations can often achieve substantial unit cost savings, especially on commodities or commodity services (such as office supplies, insurance or long distance service) and on perishable items (such as airline tickets and hotel rooms). Individual consumers, however, cannot effectively participate in the RFP process with current systems because they generally do not have the bulk buying power and resources of large organizations.

Brief Summary Text (7):

While there have been attempts to utilize the Internet to effectuate bilateral buyer-driven transactions between individual consumers and sellers, those attempts have been largely unsuccessful. For example, buyers can post "wanted" advertising at little or no cost on "bulletin board" type Internet sites. Thus, consumers can essentially post their own RFP to a large number of potential sellers. In practice, however, it is impractical for potential sellers to frequent the various "bulletin board" sites or respond to the individual RFPs which typically have diverse formats, conditions, terms, and language styles. In addition, sellers are deterred from using such a process because there is (i) no guarantee of the authenticity of the RFP, (ii) the cost of negotiating with individual consumers is often too high, and (iii) it is difficult to enforce any agreement (including payment guarantees) which may be reached between the consumer and the seller. In turn, the absence of a critical mass of sellers reduces the incentive for buyers to post their RFPs.

US Reference Patentee Name (48):

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